

# Developing the Supportive Housing Program

**curriculum**

supportive housing training series



CORPORATION *for* SUPPORTIVE HOUSING



**CUCS**  
Center for Urban Community Services, Inc.

# HUD CURRICULUM

## DEVELOPING A SUPPORTIVE HOUSING PROGRAM

**PURPOSE AND GOALS:** The purpose of this six-hour training is to provide administrative and supervisory level staff with information needed to develop and maintain a services program in a supportive housing project. This training provides an overview of the steps involved in designing and implementing an effective services program from conceptualization to developing a service menu.

### AGENDA

- I. INTRODUCTION** (20–40 minutes)
- II. PROGRAM CONSIDERATIONS**
  - A. Principles of Supportive Housing (20–30 minutes)
  - B. Philosophy of Service Delivery (30–50 minutes)
  - C. Tenant Population (10–20 minutes)
  - D. Project Goals (30–40 minutes)
  - E. Physical Design Effects on Service Delivery (10–20 minutes)
  - F. Resources (30–40 minutes)
- III. DEVELOPING A SERVICE PROGRAM**
  - A. General Service Guidelines (10–20 minutes)
  - B. Deciding What Services to Provide (10–20 minutes)
  - C. Types of Services (30–40 minutes)
  - D. Service Delivery Approach (10–20 minutes)
  - E. On-site Services and Referrals to Community Based Services (20-30 minutes)
- IV. STAFFING CONSIDERATIONS**
  - A. Staff to Tenant Ratio (5–10 minutes)
  - B. Roles, Job Descriptions and Staffing Patterns (30–40 minutes)
  - C. Supervision and Training (10–20 minutes)
  - D. Coordinating Support Services & Building Management (20–30 minutes)
- V. STRUCTURES TO SUPPORT SERVICE DELIVERY**
  - A. Communication Structures (10–20 minutes)
  - B. Partnerships and Collateral Relationships (10–20 minutes)
  - C. Record Keeping and Charting (20–30 minutes)
  - D. Developing Policies and Procedures (20–30 minutes)
  - E. Ongoing Program Development (10–20 minutes)
- VI. CONCLUSION** (10–20 minutes)

**HANDOUTS:**

1. Agenda
2. Principles of Supportive Housing
3. Supportive Services in Housing
4. Philosophical Approaches to Service
5. Small Group Exercise on Clarifying a Philosophical Approach
6. Considerations When Choosing a Tenant Population
7. Tips for Developing Effective Program Goals
8. Supportive Services Planning Worksheet: Project Goals
9. Program Goals Exercise: Translating Goals Into Services
10. Physical Design Considerations
11. Partner Selection Criteria
12. The Process For Creating Partnerships
13. Tenant Involvement
14. Supportive Services Planning Worksheet: Menu of Services Available to Tenants
15. Service Delivery Approach
16. Using Referral Services
17. Sample Job Descriptions for Supportive Housing Staff
18. Staffing Considerations in Supportive Housing
19. Supportive Services Planning Worksheet: Service Approach and Staffing Patterns
20. Group Exercise on Staff Roles
21. Supervision and Training
22. Property Management and Supportive Services: Roles and Responsibilities—Areas of Overlap
23. Communication Structures
24. Maintaining Communication Between Property Management & Social Service Staff
25. Maintaining Case Records and Documentation
26. What to Include in a Chart
27. Developing Policies and Procedures: A Guideline for Supportive Housing Providers
28. Sample Tenant Satisfaction Survey
29. Developing a Supportive Housing Program: Additional Readings

## **Trainer's Preface**

### **I. Brief Summary of Curriculum Content**

This curriculum contains at least six hours of verbal content. This does not mean the content must be covered in its entirety. Depending on the intended focus of the training and the format (exercises and small group discussions vs. large group presentation), portions of this training can be elaborated, abridged and/or deleted.

### **II. Trainer Qualification**

Key to the successful delivery of the curriculum and to participants learning is the qualifications of the trainer. What the trainer brings to the training session — including their knowledge about the subject being taught, their experience in supportive housing, and their training or teaching skills — will impact the quality of the training and the outcomes. This curriculum is intended for use by individuals with the appropriate constellation of talent and ability to guide the learning of others in addressing the issues that emerge in developing a supportive housing program. The person should have an understanding of the issues faced by clinical staff as well as building support staff.

### **III. Good Training Practice**

#### **A. How People Learn**

People learn through a combination of lecture, visual aids and participation. The more actively they are involved in the process, the more information they will retain. For this reason, eliciting answers from the group rather than presenting material is usually preferable. Additionally, it is important to include exercises that stimulate interaction and experiential learning and not spend all of the time lecturing. Be aware, however, that group participation and discussion take more time than straightforward presentations and may cut down on the amount of content that can be covered. What is minimized or deleted from the curriculum should be based on the assessment of the group's learning needs and the goals initially contracted with the group.

#### **B. Know Your Audience**

The type of setting that the trainees work in and their roles will determine the areas of the curriculum that the trainer will focus on. Gathering as much information about the group beforehand is recommended. This training is targeted towards program directors, planners and supervisory level staff.

### C. Introductions and Training Contract

Introductions should provide the trainer with more information as to who the audience is. The trainer will want to know the person's name, program and role, and what s/he hopes to get out of the training. The trainer should then clarify what will and will not be covered. This is the training contract.

### D. Acknowledge and Use Expertise of the Participants

This is important as it allows people to learn from each other, builds group cohesion, keeps people involved and establishes an atmosphere of mutual respect. It is possible that some participants will already be working in supportive programs and their experience will be very valuable to other participants.

### E. Flexibility

Throughout the training the trainer should continually assess the needs of the group and revise the amount of time devoted to each specific topic. Responding to the needs and interests of the group must be balanced with the agreement to cover certain topics. It is the trainer's responsibility to respond to the needs that arise and yet stay focused on the subject matter. For example, if participants are interested in spending a great deal of time on people with special needs, this section would be expanded and other parts shortened. If the group is working exclusively with PWA's, for example, more time would be spent on that topic area.

## IV. Training Content

### A. Sequence of Content

Depending on the area of practice of the majority of trainees (case managers, clinical supervisors and property management), the trainer may tailor the training content to address the primary area of interest of the group early on in the day.

### B. Flexibility of Content

The amount of depth that this training allows for depends on the learning needs of the training group. If the trainees are new to the concept of a services program in a housing setting, the trainer should expect to cover all of the material presented in the allotted six-hour time frame. If, however, the trainees are already familiar with this concept and prepared to focus on implementing a plan, the trainer should expect to spend more time on sections III through V and allow for more discussion.

### C. Personalizing Content

In order to personalize the training, it is important for the trainer to offer case examples or anecdotes regarding the topic. This can also be achieved by eliciting personal stories from trainees. Using these relevant stories will make the training more interesting and personal.

### D. Matching Content to a Target Audience

This training is geared toward directors and supervisory level staff, both in Management and Social Services. It is important for the trainer to ensure that the trainees match the target audience for this training. It may also be helpful for direct service staff to attend so that they understand the process of developing the program.

## V. Time Management of Content

Each section of the agenda has time frames allotted. Whenever possible, it is suggested that there be a 10 minute break every hour and a half. Of course, for an all day training there would be a lunch break for between forty-five minutes to one hour. The trainer should be aware that if a great deal of time is devoted to one topic area, other content areas might be sacrificed. Group exercises can always be abridged if necessary for time's sake. For example, if the group exercise involves dividing into four groups to work on four separate cases, the trainer should consider having each group work on a smaller number of cases. This will shorten the report back time, but will not eliminate the group process. Remember, elicitation and discussion takes more time than lecturing but less time than small group exercises. The trainer needs to balance this with the fact that lecturing is also the least effective way to teach.

The trainer will find that each time this curriculum is trained, it will vary. Being mindful of good training practice and making adjustments to the timing and sequence will allow for a tailored training that will be most beneficial to participants.

**I: INTRODUCTION** (20–40 minutes)

**TRAINER NOTE:** This section includes an introduction of the trainer, a review of the training incidentals (hours, breaks, coffee, bathroom locations), and a review of the training goals and objectives. This is followed by a roundtable introduction of trainees.

**TRAINER STATES:** The purpose of this training is to provide administrative and supervisory level staff information needed to design a services program in a supportive housing project from conceptualization to developing a service menu. Included are considerations in the process and structures to support the delivery of services. At the end of the training, participants will:

- Be able to identify a philosophical approach to services
- Understand the importance of clarifying program goals and be able to translate these goals into services
- Understand the impact of service design choices, including population served, whether services are offered on- or off-site and the effects of physical design
- Understand how to involve tenants in the design and operation of the service program
- Be able to develop a service menu appropriate to their tenant's needs and choices
- Be able to develop basic program policies and procedures
- Understand staffing considerations in designing a services program
- Be able to implement effective structures to support the delivery of services such as communication and reporting structures and a system for maintaining collateral relationships
- Understand the importance of evaluating the service program and basic evaluation methods

**TRAINER NOTE:** Trainer will introduce him/herself to trainees including experience in supportive housing, program development or service delivery. Each trainee is asked to introduce himself or herself by stating their name, agency, staff role and goals for the training. If someone mentions something in the go-round that is not on the agenda, but related, see if it can be tied to the training. Trainer should write the interests and expectations of trainees on flipchart. Trainer will review agenda and link trainee interests to agenda items for the day. See **HANDOUT #1: AGENDA**

**LEARNING POINTS:** Trainer is establishing the learning contract for the day. It is important to discuss what will and will not be covered during this introduction so trainees know what to expect.

## II. PROGRAM CONSIDERATIONS

### II.A: PRINCIPLES OF SUPPORTIVE HOUSING (20–30 minutes)

**TRAINER NOTE:** See *HANDOUT #2: PRINCIPLES OF SUPPORTIVE HOUSING*. Post the four key principles and ask trainees to brainstorm how to operationalize each principle [e.g., services to be offered]. This exercise can be done with the entire group or by breaking up into four small groups, each one assigned one principle.

#### **BRIEF LECTURE:**

The following are four key principles of Supportive Housing:

**AFFORDABILITY** — The primary purpose of supportive housing is to increase the availability of housing to low income people.

- Tenants may be expected to pay rent but typically not in an amount that exceeds 30% of gross income.
- Providers have managed to operate fiscally viable housing sites by relying upon rent subsidy programs such as Section 8 and Shelter + Care.
- Some projects also rely on the rental streams provided by units reserved for individuals who are employed, and still others have structured programs to include the use of low income housing tax credits.

**SAFETY AND COMFORT** — Tenants should feel comfortable and safe in their homes, and providers should pay particular attention to safety issues. People who have been homeless have frequently been victims of or exposed to violence. Weaker tenants can become prey and the targets of intimidation and exploitation.

- Meeting or exceeding building codes and providing extra security and “creature” comforts when resources allow are efforts that all tenants appreciate.
- A secure environment includes the development and implementation of clear administrative procedures for rent collection, building maintenance, monitoring visitors, enforcement of house rules, and is likely to include mechanisms for exchanging information with tenants. Promptly addressing safety concerns that are expressed by the tenants is important. Staff and tenants must feel that they have some collective control over their environment; they should look out for their neighbors and work together to create a safe and comfortable environment.

**SUPPORT SERVICES ARE ACCESSIBLE, FLEXIBLE AND TARGET RESIDENTIAL STABILITY** — Ideally, supportive services are reflective of the tenants’ needs and goals. Service programs also require adjustment as the needs and interests of the individual tenants and the larger residential community evolve and change. By design, support services are intended to help ensure stability and to maximize each tenant’s ability to live independently. At a minimum, support services must be easily accessible and available to tenants. Evaluating if services are effective and useful should occur on a regular basis.

- To help achieve these goals, programs emphasize ongoing assistance with medication and money management, training and assistance with activities of daily living, support in achieving and maintaining sobriety, and accessing health and mental health services.
- Service providers focus on assisting tenants to meet their lease obligations, including paying rent, maintaining a safe and healthy living environment, allowing others the peaceful enjoyment of their homes and complying with basic house rules.
- Depending upon the tenancy and the type of resources available, services can be shaped to have the widest possible appeal and may range from support groups for substance abusers to classes in cooking, the arts, high school equivalency preparation and vocational counseling.
- Linkages with legal services, immigration services and local entitlement and benefits offices are usually essential.
- Supportive housing programs vary in their ability to modify or significantly change their programs because funding, regulatory or other structural requirements may impose restrictions or limitations. In this regard, providers need to carefully weigh the long-term impact that funding or other regulatory agreements could have on a project.

**EMPOWERMENT AND INDEPENDENCE** — Supportive housing is intended for people who, at a minimum, can live independently with some assistance. The role of the supportive housing staff is to provide assistance and help the tenant increase his or her level of independence.

Examples of program efforts intended to foster independence and empower tenants include the following:

- Appointing tenant representatives to the organization's Board of Directors.
- Involving tenants directly in the management structure of a project or building.
- Providing employment opportunities and vocational services.
- Promoting a tenancy that is heterogeneous and integrates individuals with disabilities or other special needs.
- Encouraging tenant councils and advisory groups.
- Involving tenants in making and modifying house rules.
- Providing tenants with property leases.

In fostering independence, providers need to respect the individual's priorities and choices. Tenants will make life-style choices that may conflict with the provider's preferences. Alcohol, sex and gambling, for example, are issues that can be inherently challenging. Similarly, some tenants will prefer to have limited (if any) interaction with the supportive services staff or with other tenants.

Developing meaningful structures that empower tenants will help to ensure the long-term success of a project.

**TRAINER NOTE:** See *HANDOUT #3: SUPPORTIVE SERVICES IN HOUSING*.

### **BRIEF LECTURE:**

#### PURPOSE OF COMBINING HOUSING WITH SERVICES

- The purpose of combining supportive services with housing is to offer tenants a wide range of services designed to improve the quality and stability of their lives while increasing independence.
- Supportive services help people who might otherwise have difficulty living independently, such as persons with a history of homelessness and people with identified special needs. Services are geared toward assisting tenants achieve residential stability.
- Ideally, supportive services reflect the tenants' needs and goals. Effective programs adjust the services they offer as the needs and interests of the individual tenants and the larger residential community evolve and change.

**TRAINER ELICITS:** WHAT ARE EXAMPLES OF SERVICES THAT HELP TENANTS ACHIEVE RESIDENTIAL STABILITY? [Expected responses include:]

- Assistance with budgeting and paying rent
- Access to employment
- Tenant involvement in the ongoing development of the residential community, including house rules and services offered
- Medication monitoring and management
- Daily living skills training or assistance — [e.g., meal preparation, housekeeping, developing support networks and socialization]
- Medical and health services
- Counseling and support in achieving self-identified goals
- Assistance in meeting lease obligations and complying with house rules
- Referrals to other services or programs
- Conflict-resolution training

**LEARNING POINTS:** Participants will have an understanding of the basic principles of supportive housing. Trainees will also understand the benefits of combining housing with services.

**II.B: PHILOSOPHY OF SERVICE DELIVERY (30–50 minutes)**

**TRAINER STATES:** A philosophy of service delivery involves the guiding beliefs and values upon which you base your program and how you approach service delivery. These values tell outsiders what kind of an organization you are and why you embarked upon this project. The program’s philosophical approach and goals should reflect the overall agency philosophy and tie in with the organizational mission.

When developing a service program, it is important to clarify the approach to service delivery. This will provide a framework for discussing the program when hiring staff or interviewing potential tenants and developing interventions. A unified approach can also help to minimize confusion and misunderstandings among community members.

**TRAINER NOTE:** See *HANDOUT #4: PHILOSOPHICAL APPROACHES TO SERVICE*.

**BRIEF LECTURE:**

Variations in philosophical approaches are among the numerous elements that make each housing site different from the next. These are general “approach to services” categories chosen to spur discussion and not intended to cover all possible approaches. Programs may adopt aspects of one or all of the models we’ll discuss. Similarly, programs may contain elements of more than one philosophy. Let’s look at some of the characteristics of each of these approaches and the assumptions upon which they are built.

**HOUSING FIRST, VOLUNTARY SERVICES**

- Housing is a choice, not a placement
- Housing is a person’s home, not a residential treatment program
- People have a right to safe, affordable housing
- All tenants hold property leases and have the full rights and obligations of tenancy
- Participation in services is voluntary and not a condition of tenancy
- Staff must work to build relationships with tenants, particularly those who need support in maintaining their housing
- Tenants prefer “normal” living arrangements and practical, flexible supportive services
- Classes that teach skills such as yoga, creative writing or ESL might be offered as opposed to more traditional “therapeutic” groups
- Services are designed to be user-friendly and driven by tenant needs and individual goals

## CONSUMER DRIVEN

- Tenants are active community members
- Tenants are involved in planning and program design, services implementation, evaluation and policy development
- Tenants are hired as staff
- Tenants have a mechanism to communicate with or participate on the organization's board of directors
- When tenants are empowered to govern their living community they are more likely to respect property and treat neighbors with respect
- Tenants are encouraged to make lifestyle choices even though they may conflict with the provider's preferences
- Leadership development and skills training are offered
- Tenants participate in the design of the house rules and therefore may be more likely to abide by them

## HARM REDUCTION

- People deserve safe, affordable housing regardless of their special needs
- Services aim to help people reduce the harm caused by their special needs such as substance abuse, mental illness or health-related complications
- In helping people to achieve goals they set for themselves, a trusting relationship is established
- Services focus on helping tenants stay housed by assisting them to meet the obligations of tenancy, such as paying rent
- Tenants are encouraged to explore obstacles toward their goals in an open and non-judgmental atmosphere. Staff does not want to alienate tenants or cause them to hide drug use or psychiatric symptoms
- Participation in services is not usually a condition of tenancy, and the focus is on making services attractive to tenants

## SUPPORTIVE APPROACH

- Staff helps stabilize the supportive housing project by providing services to meet tenant needs
- Staff is available around the clock, either on-site or through emergency beepers, to provide the support promised to tenants during intake
- Providers seek to create a nurturing environment where tenants have easy access to food, services and social events and the need for tenants to go outside the building for services is minimal.
- Services are usually required as a condition of tenancy or at least highly encouraged

- Leverage may be used to encourage service participation

#### THERAPEUTIC COMMUNITY

- The environment is highly structured with well-defined expectations. Tenants contract to participate in a treatment process that will allow them to develop or return to socially productive lives
- It is assumed that people who end up in supportive housing need to change negative patterns of behavior. Services are designed to help tenants identify areas for change to promote their social, emotional and psychological well-being
- The community is used as the main therapeutic tool to help people grow
- Fellow tenants are seen as peers and role models while staff members are viewed as facilitators, authorities and guides in the self-help process
- Participation in services is generally required as a condition of residency

**TRAINER NOTE:** Small Group or Dyadic Exercise on Clarifying Philosophical Approach. See **HANDOUT #5: SMALL GROUP EXERCISE ON CLARIFYING PHILOSOPHICAL APPROACH.**

Break the trainees into small groups or pairs (divide by programs if possible). Allow 20 minutes to discuss the following questions from on Handout #6:

- Do any of the approaches we discussed reflect your program's philosophical approach to services? If so, how? If not, describe your approach.
- What forums exist, or would you like to see in place, for discussing the approach to services? How is the approach linked to the program goals?
- How is this approach presented to new staff?
- Choose one area (such as disruptive behaviors, program participation, or substance abuse) and talk about your programs' approach toward dealing with it.

When they are finished, ask them to report back to the larger group.

**LEARNING POINT:** The philosophy of service delivery is vital in the development of support services and should be clear to all staff.

**II.C: TENANT POPULATION** (10–20 minutes)

**TRAINER NOTE:** See *HANDOUT #6: CONSIDERATIONS WHEN CHOOSING A TENANT POPULATION*.

**TRAINER STATES:** Program considerations are impacted directly by the tenant population an agency chooses to provide services to. Some programs may choose to develop supportive housing projects specializing in support for persons living with mental illness, persons living with HIV, persons in recovery or in need of assistance with substance abuse, persons with a history of homelessness or a spectrum of other life experiences.

Some program considerations when serving people with special needs include:

- Psychiatric Resources
- Medication Management
- Appropriate Case Management
- Medical Resources
- Healthcare Support
- Home Care Resources
- Entitlements Assistance
- Training and Employment
- Education Services
- Substance Abuse Treatment Resources
- Relapse Response
- Worker/Tenant Caseload
- Unit Size
- Shared Facilities

**TRAINER STATES:** A mixed tenancy in supportive housing projects has become more common in recent years. This might mean the supportive housing project houses a combination of individuals who have disabilities with those who do not, and/or the supportive housing projects offers a mix of units for singles as well as apartments for families with children.

**TRAINER ELICITS:** WHAT DO YOU THINK MIGHT BE SOME OF THE ADVANTAGES TO DESIGNING A PROGRAM FOR A MIXED TENANCY? [Expected responses include:]

- A supportive housing project serving different kinds of people is less likely to be stigmatized than a supportive housing project that houses a homogeneous group of individuals

- Mixed housing more closely reflects the majority of communities, fitting more naturally into a neighborhood
- Mixed housing is less likely to feel institutional to tenants
- The more independent tenants can help set standards for norms of behavior
- Integrating tenants of different abilities, needs and ages can strengthen the therapeutic qualities of the environment

**TRAINER ELICITS:** IS THERE ANYONE HERE WITH EXPERIENCE INTEGRATING TENANTS WITH DIFFERENT SERVICE NEEDS, AGES AND/OR LEVELS OF INDEPENDENCE WHO WOULD LIKE TO DISCUSS THEIR EXPERIENCE? [It is helpful to hear about challenges trainees faced when integrating a mixed tenancy and strategies they employed to work through these challenges.]

**TRAINER NOTE:** The trainer should make sure the following points come up during this discussion.

- Low income working people may not want to associate with people with special needs. Oftentimes, this requires education to help dispel myths about mental illness, AIDS or whatever special needs group has been stigmatized.
- It is helpful to blend funding streams so that the provider can work with the whole person and not just one of his/her "problems." However, multiple funding streams can be a complex process.

**TRAINER STATES:** Serving one specific population can also be a viable choice. There are many supportive housing projects around the country that were designed exclusively to meet the needs of people with specific disabilities and some are model programs. These programs can be a good fit for organizations that may be reluctant to serve tenants with problems unfamiliar to staff or who do not feel ready to take on more diverse tenant configurations that will introduce a wider set of demands.

Later, in Developing a Service Program, we will address adapting services to meet the needs of specific tenant populations. Programs that have a concentration of individuals with disabilities or other special needs will likely emphasize ongoing assistance with medication and money management, training and assistance with activities of daily living, employment services, support in achieving and maintaining sobriety and assistance accessing health and mental health services.

**LEARNING POINTS:** Supportive housing programs are diverse and intended to have the flexibility to serve a wide range of individuals with services adapted to the needs of the tenants. The tenancy to be served has a major impact on the design of the service program. A sound understanding of the specific needs of the populations to be served is critical to designing an effective program.

**II.D: PROJECT GOALS** (30–40 minutes)

**TRAINER STATES:** Program goals are concise statements of what a program is designed to accomplish. They are the long-term aims of the program and are driven by the philosophical approach and values of the organization.

**TRAINER ELICITS:** WHY DO YOU THINK PROGRAM GOALS ARE IMPORTANT? WHAT PURPOSE DO THEY SERVE IN THE DESIGN AND DEVELOPMENT OF A SERVICE PROGRAM? [Expected response include:]

- Goals provide a focus for the work
- Goals drive every aspect of program design, including staff hired, tenants accepted and the services offered
- Goals define desired outcomes

**TRAINER NOTE:** See *HANDOUT #7: TIPS FOR DEVELOPING EFFECTIVE PROGRAM GOALS* and *HANDOUT #8: SUPPORTIVE SERVICES PLANNING WORKSHEET: PROJECT GOALS*.

**TRAINER STATES:** Goals define the results of what you intend to do. A goal can be stated as a description of a condition the program will achieve through services provided (outcome goal), or a measurable value of the services offered (process goal). Funders often want to see process goals since they describe the work that was done [e.g., a program may be asked to document the number of face-to-face contacts in a month or the number of tenants housed]. These types of process goals, however, do not reflect whether or not the program has achieved its desired outcome or mission.

Outcome goals should be stated in terms of measurable criteria, be related to tenants' needs and preferences and be written clearly, without jargon or ambiguity. Services can be seen as a means of actualizing program outcome goals. For example, providing career counseling is a means of actualizing the goal of employing tenants in meaningful work.

**TRAINER ELICITS:** WHAT ARE SOME EXAMPLES OF TYPICAL OUTCOME GOALS IN A SUPPORTIVE HOUSING PROJECT? [Expected responses include:]

- Provide safe, affordable housing as a permanent residential option
- Assist tenants in securing jobs that increase their income
- Assist tenants in recovering from substance abuse
- Reduce harm experienced by tenants due to substance abuse
- Assist tenants in reducing symptoms of mental illness
- Promote the use of available community based services
- Improve tenant's daily living skills

**TRAINER STATES:** In many programs, goals are implicit and not openly discussed among community members. Without discussing goals openly, different people may have different ideas about how goals affect the day-to-day services that are offered. For example, if a program goal is to help every tenant become as independent as possible, one staff member may interpret that to mean avoiding all services that infantilize tenants. This might include things like helping people get to appointments, managing medications, knocking on doors to check on people who haven't been seen in a while. Another staff member might see those same services as the supports necessary to assist people in reaching their maximum level of independence.

**TRAINER NOTE:** The following exercise will help highlight the different ways a goal might be interpreted. Case Examples Translating Goals into Services. See **HANDOUT #9: PROGRAM GOALS EXERCISE: TRANSLATING GOALS INTO SERVICES.** Divide trainees into small groups, giving two cases to each group, and ask them to discuss the following:

- Come up with as many interpretations as possible for each goal.
- What services would you provide to achieve this goal?
- Make suggestions about how these goals might be re-worded to clarify their meaning.

1. The program will provide services and create an environment that fosters health and sobriety.

*TRAINER'S KEY: PHILOSOPHICAL INTERPRETATIONS may include: Harm Reduction Model; or Abstinence Based Housing; or Therapeutic Community Model.*

*SERVICE INTERPRETATIONS may include: "Harm reduction model would provide low-demand, high-reward services that aim to reduce harm and focus on raising awareness and navigating persons toward abstinence.", or "Abstinence based housing would provide relapse prevention and support services for persons in recovery that may or may not tolerate relapse.", or "A therapeutic community would provide concrete services that focus on changing negative behavior and recovery that would not tolerate relapse."*

*RE-WORDING MAY INCLUDE: "The program will provide services and create an environment that fosters health and sobriety to active users."; or "The program will provide services and create an environment that fosters health and sobriety for persons in recovery to assist them to maintain recovery."; or "The program will provide services and create an environment that fosters health and sobriety to persons with addiction and in need of support in a structured, time-limited manner."*

2. The program strives to maximize tenant choice about the living environment.

*TRAINER'S KEY: PHILOSOPHICAL INTERPRETATIONS may include: "The entire design concept will include consumer involvement." or "Tenants will have input into the design of their apartments."*

*SERVICE INTERPRETATIONS may include: "A committee of prospective tenants will participate from the conceptualization of the service program to the implementation and be represented on the Board of Directors."; or "The program will maximize tenant choice by allowing individuals to personalize their living environment, including picking the type of furniture and apartment choice [i.e., front vs. back apartment, lower or upper floor]."*

*RE-WORDING may include: "The program strives to maximize tenant choice about the living environment by having tenants actively participate in the entire design of the program." or "The program strives to maximize tenant choice about the living environment by having tenants choose apartments and participate in personalizing the living space."*

3. The program will serve anyone who could benefit from our housing and services. We will accept all applicants to our housing as long as they are committed to improving the quality of their lives.

*TRAINER'S KEY: PHILOSOPHICAL INTERPRETATIONS may include: "All persons who apply for services will be provided services." or "All persons assessed to be committed to improving the quality of their lives will be provided services."*

*SERVICE INTERPRETATIONS may include: "Services are provided to all individuals interested in our program on a first come, first serve basis [no one will be turned away]." or "Services will be provided to any individual who is assessed by staff during triage to be committed to improving the quality of their lives [triage for greatest degree of need or prioritize those that are the most likely to succeed.]"*

*RE-WORDING may include: "The program will serve all persons who could benefit from the program's housing and services on a first come first serve basis." or "The program will serve anyone who could benefit from our housing and services that staff assesses as committed to improving the quality of their lives as defined by the program."*

4. The goal of this residence is to create and maintain a sober living environment.

*TRAINER'S KEY: PHILOSOPHICAL INTERPRETATIONS may include: "Relapse is not tolerated." or "Relapse is tolerated"*

*SERVICE INTERPRETATIONS may include: "All residents are required to maintain sobriety, and anyone caught using drugs or alcohol will be*

*terminated from the program.” or “All residents are required to work with staff and anyone relapsing must be willing to work with staff to regain sobriety.”*

*RE-WORDING may include: “The goal of this residence is to create and maintain a sober living environment for all residents with zero tolerance of use.” or “The goal of this residence is to create and maintain a sober living environment that recognizes relapse as a normal part of recovery and assists persons who may relapse regain sobriety.”*

5. Service staff will assist tenants in reaching their self-identified goals.

*TRAINER’S KEY: PHILOSOPHICAL INTERPRETATIONS may include: “Voluntary service” or “Mandatory services.”*

*SERVICE INTERPRETATIONS may include: “Services are voluntary and designed to build trust, be attractive and relevant to tenants with a focus on consumer-determined goal setting.” or “Tenants will be required to participate in goal setting as a condition of their tenancy.”*

*RE-WORDING may include: “Service staff will assist tenants in reaching their self-identified goals by offering voluntary services focusing on individualized tenant needs.” or “Service staff will assist tenants in reaching their self-identified goals as a condition of tenancy in the program.”*

6. This program aims to integrate special needs and non-special needs tenants.

*TRAINER’S KEY: PHILOSOPHICAL INTERPRETATIONS may include: “Services will be offered to all tenants regardless of special needs.” or “Services will only be offered to tenants with special needs.”*

*SERVICE INTERPRETATIONS may include: “Services will be offered equally to all tenants in an integrated community of special needs and non-special needs tenants.” or “The community of integrated tenants will share living space but only tenants identified as having special needs will be provided services.”*

*RE-WORDING may include: “This program aims to integrate special needs and non-special needs tenants by offering all services to all tenants.” or “This program aims to integrate special needs and non-special needs tenants and will be providing support services to those tenants identified as having a special need.”*

**LEARNING POINTS:** Participants will understand that goals focus the work and drive program design. Every service offered should be meeting an intended goal. Goals mean different things to different people, so all staff should be clear on the interpretation.

**II.E: PHYSICAL DESIGN EFFECTS ON SERVICE DELIVERY (10–20 minutes)****TRAINER NOTE:** See *HANDOUT #10: PHYSICAL DESIGN CONSIDERATIONS***BRIEF LECTURE:**

Social service staff should participate in the design process from the start, as the architects may not be fully familiar with the workings of an on-site supportive housing program. Successful service programs take into account the effect that the physical plant will have on the delivery of the services and adapt them accordingly. In cases where a project involves renovation or new construction, the physical building design should be compatible with the plan for delivering services.

**SOME SPECIFIC PROGRAM DESIGN CONSIDERATIONS:****OFFICE SPACE & LOCATION OF SERVICES**

- Are offices easily accessible to all tenants, including those with physical disabilities?
- Do offices provide privacy?
- Is there an institutional appearance to the service offices?
- Is there room for staff to hold meetings?

**COMMON SPACES**

- Is there a homey and inviting atmosphere to common spaces?
- Is there a lobby or place where people naturally must come and go? (Can make it easier for staff to interact with people who might not ever come into an office).
- Is there sufficient common space to hold activities, classes and groups?
- Is the atmosphere of the common spaces welcoming?

**SECURITY FEATURES**

- Is the front entry area supervised?
- Are security cameras placed where they can help security staff keep an eye on out-of-the-way areas?
- Do tenants carry keys or have keycard entry? What happens when tenants lose keys?
- Do security staff patrol floors at night after staff leaves?
- Is the building equipped with appropriate outside lighting?

**GENERAL BUILDING DESIGN**

- Does the building fit in with other buildings in the community?
- Was the building built to be a permanent residence or has it been re-designed to accommodate tenants?

#### UNIT DESIGN

- Will the units be self-contained [private bath and kitchen]?
- If not self-contained, how many tenants will be sharing facilities?
- Shared facilities may be seen as transitional.
- Will the units be furnished?

**LEARNING POINTS:** Social service should participate in the physical design plans. The physical layout of a project should provide adequate and appropriate space for the delivery of services. Living units should be appropriate for the populations served and the project goals.

**II.F: RESOURCES** (30–40 minutes)

**TRAINER STATES:** As part of the process of designing a service program [and often as part of deciding to do a project in the first place], it is essential to evaluate your agency's capacity to design and operate the service program. The agency must look at its organizational structure, financial management and other administrative resources, clinical knowledge and practice skills to assess what additional resources are needed to create a successful program. Some considerations when assessing your capacity to meet the service needs of tenants include:

- **MISSION:** Providers should look at their overall organizational mission and decide how this project fits in. What are differences and similarities about this project as compared with others the organization now runs? If the project reflects an emerging need that has not yet been addressed by the agency, have discussions taken place about how this project might change/expand the focus of the organization?

It is helpful to plan for organizational growth and/or an expansion of the organizational mission as this can cause much stress and conflict in agencies that are not prepared for the changes. What would be helpful in assisting the agency to meet the needs of the project: partnerships, sub-contracts, consultants or toughing it out?

- **STAFFING:** Are resources available for developing the service program? Is there adequate staff capacity and expertise to design and develop such a program? Providers who have tried to cut costs by cutting back on staff coverage sometimes face the difficult task of trying to get funding after the fact, when they realize the resources are inadequate for meeting the needs of the tenants.
- **SERVICE ACCESS:** How will you access the range of services that your tenant population needs? Will the agency consider choice of services as a priority? Providers often decide to encourage the use of community services and make decisions to minimize treatment services on-site.
- **FUNDING:** Funding must ensure a staff to tenant ratio that will allow for effective helping relationships to develop. When funding is inadequate to meet the needs of the tenants, the provider must consider making changes in the population to be served or the goals of the program. Programs must ensure that all funding available to serve the tenant population can be accessed. For programs with a mixed population, most programs use multiple funding sources. Programs should assess their capacity not only to access funding but assure compliance with the requirements of each funding source as well. This includes financial management, reporting compliance and ability to manage clinical documentation.

- **COMMUNITY RESOURCES:** Some providers may decide to utilize community resources through referrals for some services. Programs must thoroughly assess the resources in the community for quality, availability, accessibility and whether they are appealing to tenants. Most agencies form agreements with local service providers to ensure that tenants have a choice of providers and that necessary services are accessible. Later in this training, we will look at how to develop relationships with community providers.
- **PARTNERSHIP:** Many agencies decide to partner with another organization with expertise in providing a certain aspect or aspects of the supportive housing project. Agencies may form a partnership with a developer and/or property manager. An agency may decide to sub-contract some of the task of running a building or decide to hire consultants to assist them.

**TRAINER STATES:** If your organization decides to partner with another agency, evaluating a “good fit” is crucial. Just as in any relationship, it needs to be assessed whether or not the two organizations are compatible.

The following broad areas should be looked at in assessing compatibility. Assessing compatibility takes time and usually requires more than one meeting.

**TRAINER NOTE:** See ***HANDOUT #11: PARTNER SELECTION CRITERIA.***

#### THE ORGANIZATION'S MISSION AND GOALS

- What do you think the goals of this project should be?
- What populations are you interested in serving and why? (e.g., singles, families, people with special needs)
- What are the reasons you want/need to partner with another organization?

#### THE ORGANIZATION'S VALUES AND PHILOSOPHY

- Does your agency have an approach to services in supportive housing?
- What motivates your agency to be involved in this project?

#### THE ORGANIZATION'S EXPERIENCE WITH SIMILAR PROJECTS

- How much experience does your organization have with projects of this type?
- What experience do you have working with a partner?

#### THE ORGANIZATION'S EXPECTATIONS FOR TENANT BEHAVIOR

- What kinds of behavior from tenants will be unacceptable to you? (e.g., alcohol use, drug use, bizarre dress, poor personal hygiene, noise disturbances)
- What will you expect from tenants and what should they expect from you?

- How have you or how do you plan to involve tenants in activities?
- What are your expectations regarding house rules? (e.g., overnight guests, disruptive behavior)
- What should the eviction criteria be?

#### THE ORGANIZATION'S MANAGEMENT STYLE/ORGANIZATIONAL CULTURE

- Describe your staff (include staffing pattern, expertise, scheduled hours, supervisory hierarchy).
- What decisions do you think should be made jointly between property management and social service teams?
- How does your agency handle conflicts in working relationships?
- How do you propose to handle tenant information sharing between your agency and staff from other agencies, including your partner?

#### THE ORGANIZATION'S VISION FOR COLLABORATION

- What kinds of issues do you think your partner agency should be responsible for? (address primary responsibility during rent-up, house rules enforcement, evictions, staff hiring for example)

**TRAINER STATES:** The following are suggested steps in the process for creating a partnership.

**TRAINER NOTE:** See *HANDOUT #12: THE PROCESS FOR CREATING PARTNERSHIPS*. Review points in handout.

- Research and identify potential collaborators
- Send a Request for Proposals (RFP) to a short, prescreened list of qualified and interested providers which have been identified through interview and recommendations
- Arrange a meeting to discuss selection criteria with respondents to the RFP
- Visit each other's sites and offices
- Arrange a series of meetings to further explore compatibility
- Write down agreed upon concrete project goals that balance the interests of the parties
- Work on preliminary project tasks together, such as creating a project specific organizational chart, house rules, tenant handbook, etc.
- Solidify the agreement: After you have chosen a partner and agreed to work together, you can draft a letter of intent between your organizations. This will specify the date the parties enter the agreement, your intent to work together to develop and/or maintain the supportive housing project and the tenancy to be

served. The roles of each party should be outlined, which party will be responsible for various costs and a project timeline should be included. It should also contain information about terminating the agreement if either party fails to perform their responsibilities. Legal counsel should review this document.

- Invest in mutual cross training: Two subjects which invariably come up include how to share information and principles of confidentiality, and building staff training on understanding people with special needs.

**LEARNING POINT:** Resources such as mission fit, staffing, community resources, access to services and partnership considerations must be considered when designing a service program. Decisions in one area often affect decisions in others. Developing partnerships early in the program development process is important. Providers must allow enough time to get to know potential partners and ensure a good fit.

### III.: DEVELOPING A SERVICE PROGRAM

#### III.A: GENERAL SERVICE GUIDELINES (10–20 minutes)

**TRAINER NOTE:** The trainer should use this section as an introduction to considerations in developing a service program.

**TRAINER STATES:** The primary goals of most supportive service programs are to help tenants maintain their housing and maximize their capacity for independent living. Some people will need life-long support to accomplish these goals. Others may need them for a few months, and still others may need varying levels of support at different points in their lives.

Supportive housing, where tenants can live as long as they need or want to, provides an excellent opportunity to serve a range of people based on their individual needs. In order to meet tenants where they are, services must be easily accessible and offered on a flexible basis. Next we'll address how to decide what specific services you will provide in your supportive housing project.

**LEARNING POINTS:** Services in supportive housing are meant to be flexible and to adjust to the changing needs of tenants.

#### III.B: DECIDING WHAT SERVICES TO PROVIDE (10–20 minutes)

**TRAINER ELICITS:** WITH THE VAST ARRAY OF SERVICES YOU COULD PROVIDE IN YOUR HOUSING, HOW DO YOU DECIDE WHICH YOU WILL ACTUALLY OFFER? [Expected responses include:]

- Provide services that meet tenant needs and preferences
- Offer services that staff have expertise or experience in providing
- Consider available resources and try not to duplicate services that already exist in the community
- Solicit input from tenants or prospective tenants

**TRAINER NOTE:** See *HANDOUT #13: TENANT INVOLVEMENT*.

**TRAINER STATES:** Depending on the philosophical approach to service provision, a program may encourage minimum or maximum involvement of tenants in the design, operation and evaluation of the program.

**TRAINER ELICITS:** WHAT ARE THE BENEFITS OF INVOLVING TENANTS IN MAKING DECISIONS ABOUT THE SUPPORTIVE HOUSING PROJECT AND PROGRAM? [Expected responses include:]

- Increases resident satisfaction by providing relevant activities and services
- Increases the likelihood that the building will be maintained since tenants are more likely to take care of their homes if they feel they have a sense of ownership
- Allows for the identification of problems in all areas of living including services and management and provides a route to address them
- Promotes a set of positive norms that counteracts the development of negative communities and illicit activities
- Combats isolation that can result in psychiatric deterioration and relapse
- Teaches tenants the skills needed to impact their environment
- Increases opportunities for communication (peers, tenant to staff, etc.)
- Improves social and psychological ties among community members
- Enhances pride (more likely to invite family or friends to visit if tenants feel proud)
- Allows for increased opportunities for interaction in buildings with “mixed populations”
- Increases safety and security

**TRAINER ELICITS:** WHAT ARE SOME OF THE COSTS OR CHALLENGES ASSOCIATED WITH INVOLVING TENANTS? [Expected responses include:]

- Being part of a community means sharing part of oneself (time, experience) For some, this may seem like an invasion of privacy
- Some tenants may fear disappointment, having participated in ineffectual groups in the past
- Some tenants may fear staff retaliation for expressing negative opinions about the supportive housing project or another individual
- The skills needed for involving tenants may be outside the area of expertise for some providers
- Providers may fear creating a “grump wagon” or gripe session among tenants
- A more democratic and egalitarian model presents the risk that tenants who gain power through this process can operationalize an agenda that may differ from that of staff (e.g., may have different priorities)
- Staff may feel that time-consuming efforts to involve tenants in decisions are additional responsibilities not included in their job/roles as case managers

**TRAINER NOTE:** Write the following two headings on flipchart and as trainees give examples of each, record responses where they belong.

**TRAINER ELICITS:** WHAT ARE SOME OF THE STRATEGIES YOU USE OR SERVICES YOU OFFER TO INVOLVE TENANTS IN DECISIONS ABOUT THEIR HOMES? [Expected responses include:]

#### INVOLVE TENANTS IN DECISION-MAKING PROCESSES

- Involve tenants in the planning of activities, outings, parties
- Identify natural leaders and develop leadership skills
- Solicit input about the services offered
- Involve tenants in the development of house rules and other building policies
- Create open communication forums such as community meetings
- Establish tenant advisory committees
- Hire tenants in staff positions
- Involve tenants in the intake/tenant selection process

**LEARNING POINTS:** Programs should provide services that meet the needs and preferences of tenants. Tenant input is vital in this process.

### III.C: TYPES OF SERVICES (30–40 minutes)

**TRAINER NOTE:** See *HANDOUT #14: SUPPORTIVE SERVICES PLANNING WORKSHEET: MENU OF SERVICES AVAILABLE TO TENANTS*. This handout can be used to plan a service program or review an existing program [which services are provided, which are needed and who should provide them]. If time allows, break trainees into small groups and ask them to use the worksheet as described.

#### GENERAL SUPPORTIVE SERVICES

- Orienting new tenants/help moving in; Tenant's rights education; Case management/service coordination; Tenant engagement; Psychosocial assessment; Peer mentoring; Support groups; Recreational opportunities; Legal assistance; Transportation; Emergency financial assistance; Educational workshops and classes

#### INDEPENDENT LIVING SKILLS

- Communication skills; Conflict resolution/mediation training; Budgeting, rent payment; Credit counseling; Money management; Entitlement assistance; ADL training (cooking, cleaning, self-care, using transportation)

#### HEALTH/MEDICAL SERVICES

- Creating a healthy culture (nutritional services, exercise classes, smoking cessation classes); Health education; Personal care education/assistance; HIV/AIDS services

#### MENTAL HEALTH SERVICES

- Engaging tenants with a mental illness; Normalizing/destigmatizing mental illness; Education about mental illness and psychotropic medications; Liaison with psychiatrist

#### SUBSTANCE ABUSE SERVICES

- Approaches for dealing with abuse and relapse (damp, dry, wet); Establishing rules, consequences, and expectations for behavior; Links to detox, rehab and/or substance abuse counseling and self-help groups

#### VOCATIONAL SERVICES

- Career counseling; Job training; Job placement (include supportive and competitive employment)

#### SERVICES TO FAMILIES

- Support groups for parents, children and/or families; Parenting and child development classes; Childcare; Domestic violence services; Family reunification

**LEARNING POINTS:** Participants will understand the benefits of using a planning worksheet to help determine the types of services that will be offered.

**III.D: SERVICE DELIVERY APPROACH** (10–20 minutes)**TRAINER NOTE:** See *HANDOUT #15: SERVICE DELIVERY APPROACH*

**TRAINER STATES:** In order to provide services to tenants, service staff must work to engage tenants. Engagement strategies might include phone calls, knocking on doors and hosting dinners or parties. When services are offered voluntarily, the onus is on staff to make those services attractive. Providers need to consider how staff will make themselves available to tenants.

**TRAINER ELICITS:** WHAT ARE SOME OF THE PARAMETERS YOU'VE ESTABLISHED FOR MAKING YOURSELVES AVAILABLE TO TENANTS IN YOUR BUILDINGS? [Expected responses include:]

- Available on-site 24 hours a day
- On-site some hours and days
- Evening Hours
- Located at a centralized office off-site
- On-call 24 hours per day
- Meet tenants in their homes
- See tenants in the office only
- See tenants by appointment only

**TRAINER STATES:** In deciding which services you will provide, it is important to think about whether you will provide them on an individual basis or in groups.

**TRAINER ELICITS:** WHAT ARE SOME CONSIDERATIONS IN DECIDING TO OFFER VARIOUS SERVICES IN GROUPS OR INDIVIDUALLY? [Expected responses include:]

- Group work allows for economy of time and effort. More people can be assisted in less time. More cost effective.
- Groups allow for identification with peers.
- Groups allow the leader to observe participants interacting with others. These observations could provide important information about how participants may interact with others in a work place or other setting.
- Individual work allows for privacy and confidential sharing of information.
- Individual work is effective for some people who may feel that their issues need more personal attention and time.
- Individual work provides an individualized teaching and learning opportunity. Groups are directed toward the general, common needs of members.
- While groups offer an opportunity for support, may also offer more sources of critical feedback. This may have a negative impact on some people.

A consideration in deciding when to provide groups includes staff capacity. Programs must assess if staff has experience running groups and if resources are available to train staff in this area. Adequate resources must be available to provide for the needs of group members. This may include food, money to pay for outside speakers or any special equipment. Naturally, a space that can comfortably accommodate the group is required.

**TRAINER STATES:** In determining what types of groups to offer, groups conducted in supportive housing generally fall into three broad categories:

- **SUPPORTIVE:** Designed to provide support and mutual aid around a general or more specific theme or problem (e.g., eating disorders, substance abuse, mental illness, women's/men's issues, parenting, etc.). The expectation would be that tenants would discuss relevant issues, review coping strategies and offer support to each other.
- **EDUCATIONAL:** Designed to teach a skill or skills such as personal grooming, budgeting, resume writing, smoking cessation, yoga, etc. Some providers have found that tenants are more likely to attend informational groups or classes as they are less personally revealing. A person may choose to attend a recovery group off-site but feel less inclined to discuss their relapse with their neighbors. Some providers have charged a small fee for their classes and made them available to staff and external community members.
- **TASK/ACTIVITIES:** Designed to accomplish a task or tasks such as a house rules committee, tenants' recreation planning group, advocacy group, etc. Some providers combine such tasks-related groups with educationally focused groups that teach leadership, advocacy and organizing skills.

**LEARNING POINT:** Programs must determine the delivery approach for services. Considerations include hours, outreach, group work and individual counseling. Group work should include thought regarding the type, need, space, capacity, advantages and disadvantages of this method of delivery.

### **III.E: ON-SITE SERVICES VERSUS REFERRALS TO COMMUNITY BASED SERVICES (20–30 minutes)**

**TRAINER NOTE:** See *HANDOUT #16: USING REFERRAL SERVICES*. This handout provides suggestions for developing an effective referral system and for collaborating with existing community agencies.

**TRAINER ELICITS:** WHAT ARE SOME ISSUES YOU TAKE INTO CONSIDERATION WHEN DECIDING WHICH SERVICES TO OFFER ON-SITE AS OPPOSED TO REFERRING TENANTS TO SERVICES IN THE COMMUNITY? [Expected responses include:]

- If a program believes that tenant independence is increased by the use of community services, that program is more likely to make an effort to refer outside the building for services whenever possible
- Relying on available community based programs can help make the most of a limited service budget
- It remains important to have on-site staff to maintain solid relationships with tenants and address a wide range of issues, including access, follow-up and continuity of services in the community
- Privacy issues with groups offered on-site. For example, attending an on-site AA meeting could identify a tenant with a substance abuse issue

**TRAINER STATES:** Working in collaboration with existing community services is vital to a social service program. A major principle of this model is a good referral system, which includes:

- Share resources and lessons learned between staff [no reason to re-invent the wheel when using outside services]
- Integrate your program into the community to access other existing resources
- Invite community representatives from various agencies in your area to your site for meetings and informational sessions
- Send literature about your program to other community based services
- Get to know the contacts at the various referral agencies
- Integrate resource sharing into the programmatic design at your site (in-house resource log, community Rolodex with important numbers and contact persons, tenant input on the quality of services offered by referral agencies)

- Be mindful that contact between your site and the referral site should be done only when a consent form has been signed by the tenant. Be sure to have releases (consents) signed by tenant for active and consistent communication between case management and referral site
- Be sure to document all salient information received or given to referral agency

**LEARNING POINTS:** Supportive services focus on helping tenants meet the obligations of their leases or occupancy agreements and develop the skills to live stably in the community. The list of services we reviewed today are some of those that are critical in achieving residential stability and maximizing capacities for independence. In addition to selecting a menu of services, programs must decide about models of service delivery (individual/groups) and which to provide on-site as opposed to by referral.

## **IV: STAFFING CONSIDERATIONS**

### **IV.A: STAFF TO TENANT RATIO** (5–10 minutes)

**TRAINER NOTE:** Trainer may decide to have a dialogue with trainees regarding their experience with staffing patterns and brainstorm solutions to problems associated with staffing patterns.

#### **TRAINER STATES:**

The staff to tenant ratio in supportive housing varies depending on the service needs of tenants. The general range is somewhere between one staff person for every ten tenants (when serving persons with disabilities or special needs) to one staff person for every thirty tenants.

**LEARNING POINT:** Determining the staff to tenant ratio will assist in developing staffing patterns that will allow for adequate service delivery. The appropriate staff ratio depends on the extent of need among the tenant population(s) and the scope and goals of the service program.

**IV.B: ROLES, JOB DESCRIPTIONS AND STAFFING PATTERNS (30–40 minutes)**

**TRAINER NOTE:** See *HANDOUT #17: SAMPLE JOB DESCRIPTIONS FOR SUPPORTIVE HOUSING STAFF*, *HANDOUT #18: STAFFING CONSIDERATIONS IN SUPPORTIVE HOUSING*, and *HANDOUT #19: SUPPORTIVE SERVICES PLANNING WORKSHEET: SERVICE APPROACH AND STAFFING PATTERNS*. Trainer can mention that *HANDOUT #19* can be used as a guide in developing staffing patterns.

**TRAINER STATES:** Most supportive housing projects utilize a case manager model. This usually consists of a professional staff member to oversee the service program and a case management staff made up of both paraprofessionals and/or professionals to provide direct services to tenants. We'll now take a look at some of the different roles and responsibilities of various staff working in supportive housing projects.

**TRAINER ELICITS:** WHY DO YOU THINK IT IS IMPORTANT FOR ALL STAFF MEMBERS TO HAVE CLEAR JOB DESCRIPTIONS? [Expected responses include:]

- Having clear expectations helps staff gain confidence
- Staff cannot be expected to meet expectations if they don't know what they are
- Job descriptions and clear expectations let people know if they are doing a good job or not
- Job descriptions tell other people, in and outside your organization, who is doing what
- Job descriptions explain the job to applicants when you are hiring
- Job descriptions give parameters for where various roles fit into the overall agency
- Job descriptions provide information that can be used to hold staff and supervisors accountable

**TRAINER NOTE:** GROUP EXERCISE ON STAFF ROLES. See *HANDOUT #20: GROUP EXERCISE ON STAFF ROLES*. Break trainees into small groups of four or five depending on the number of trainees. Assign each group one or more of the following job titles and instruct them to brainstorm about the various roles and responsibilities associated with that title. Ask the small groups to report back to the larger group in about 15 minutes. Ask trainees to note any issues of collaboration with other staff for each role discussed, pros and cons of having this position in the program and which role responsibilities became confusing and why. Following each position listed below are areas that are likely to emerge in the group discussions. Although specific titles for staff positions may vary from program to program, the following provides a listing of common titles.

**BRIEF LECTURE:**

There is a myriad of different staffing patterns used in supportive housing programs across the country. The staff required will depend on the size of the supportive housing project, the populations served and the goals of the program. Most supportive housing projects use a direct service staff/tenant ratio of between 1:10 and 1:25. (This ratio is for supportive service staff only and does not include facility or property management staff.) The following list of positions are common staff titles and roles funding supportive housing programs.

- **PROGRAM DIRECTORS/SUPERVISORS** — oversee program development, implementation, coordination and evaluation, provide regular supervision to direct service staff, orient new staff to program mission, goals, policies and procedures, coordinate site coverage, ensure that the development and implementation of service plans are consistent with program goals and of maximum benefit to tenants, monitor and evaluate staff performance, coordinate social services with building management services, develop and modify policies and procedures, identify problems related to resources and personnel management, oversee production of internal and external reports, oversee compliance with funders, usually requires a masters degree and significant experience in this area
- **CASE MANAGERS** — provide direct services to tenants, develop and implement individual service plans, assist tenants in achieving goals, facilitate groups and activities, teach and/or assist tenants in developing ADL, communication and self-advocacy skills, facilitate the development of tenant council and other community building activities, make referrals to community based services, assist in accessing and maintaining entitlements/benefits, advocate for needed services and assist tenants in meeting the obligations of tenancy, may be para-professional position
- **SUBSTANCE ABUSE/MICA SPECIALISTS** — may not be assigned their own case load but instead may run groups related to substance use and work directly with tenants who have issues with use, oversee recovery readiness services, provide relapse prevention and recovery planning services, provide individual counseling, facilitate methadone maintenance services, educate staff and tenants about approaches to managing substance use, such as stages of change and harm reduction, organize sober recreational activities, requires experience in substance use services
- **RESIDENTIAL AIDES** — assist Case Managers in carrying out their responsibilities, provide support and concrete assistance to tenants, assist/train tenants in the skills of daily living, escort to appointments, provide supervision and coverage, para-professional position
- **RECREATION SPECIALISTS** — run groups and arrange for various activities on- and off-site, including music, art or exercise classes, may work individually with tenants needing assistance socializing or reducing isolation, plan events and celebrations, identify recreational opportunities in the neighborhood and surrounding community, para-professional position with preference of community connections

- **ADL SPECIALISTS** — assist and teach tenants basic living skills such as budgeting, cooking, personal hygiene and self-care, housekeeping activities, use of public transportation and other community services, para-professional position
- **PEER COUNSELORS** — staff who have had life experiences similar to the tenants of the supportive housing program (e.g., homelessness, mental illness, substance use, HIV), provide support and concrete assistance, teach advocacy skills and apply principles of self-help programs, para-professional position
- **VOCATIONAL COUNSELORS** — also called Career Counselors or Employment Specialists, conduct vocational/educational assessments and assist tenants in developing career plans, work with Case Managers to integrate vocational plans into general service plans, identify obstacles to maintaining employment and provide ongoing assistance in minimizing the negative impact of these obstacles to success, para-professional position, experience in employment and vocational counseling
- **JOB DEVELOPERS** — establish relationships with businesses in the community to help secure jobs for program participants. Job Developers also serve as liaisons between the supportive housing project and the job site and address problems and issues that come up regarding specific placements, para-professional position, experience in employment development

**LEARNING POINTS:** There are numerous ways to design and staff a service program, but clearly defined staff responsibilities are essential in the delivery of support services.

**IV.C: SUPERVISION AND TRAINING** (10–20 minutes)**TRAINER NOTE:** See *HANDOUT #21: SUPERVISION AND TRAINING*.**TRAINER ELICITS:** WHAT STRATEGIES DO YOU USE TO HELP ENSURE YOUR STAFF HAS THE CAPACITY TO PERFORM THEIR JOBS? [Expected response include:]

- Hire staff with experience and expertise
- Provide regular supervision
- Provide staff training and opportunities for advancement
- Ensure staff have adequate resources to carry out their responsibilities
- Check that expectations placed on staff are realistic
- Design a workable staffing pattern

**TRAINER ELICITS:** WHAT IS THE PURPOSE OF SUPERVISION? [Expected responses include:]

- Hold staff accountable to program and regulatory standards
- Orient staff to their roles
- Orient staff to the mission of the organization
- Teach skills and connect to resources
- Help staff identify learning needs and goals
- Help support people to do their best jobs

Supervision can happen in a variety of ways, depending on many factors. In the beginning with a new employee, you may have a designated time you meet regularly for a certain amount of time. Perhaps over time, you meet less frequently and for less time, depending on whether the employee feels the need to meet. In any case, it is almost always favorable to provide regular ongoing meetings as opposed to quick discussions on the run for the following reasons:

**TRAINER ELICITS:** WHY IS IT IMPORTANT TO PROVIDE REGULAR ONGOING SUPERVISION? [Expected response includes:]

- The supervisor has control over the process of supervision. In the crisis-driven world of residential services the supervisor can create a safe haven for the employee
- Creates a safe relationship to help individual take risks and grow
- Addresses strengths and weaknesses together so that problems/negatives are not the only focus of face-to-face meeting

- Allows for more planning regarding interventions and approaches
- Allows for early intervention of problem behaviors and provides support and education to address problems so they don't snowball
- Allows time for goals to be identified and progress toward work goals as well as personal goals to be monitored
- Allows the supervisor better accountability, quality assurance

**TRAINER STATES:** Agency support for supervision must be in place to make effective supervision a reality. If the supervisor is expected to devote time and effort to providing regular supervision, the organization also needs to allow time in the schedule for meetings and should consider the workload assignments of supervisors.

All levels of staff should receive training. Training can be provided by in-house specialists, informal topic guided meeting ["brown bag" discussions], bringing in outside trainers and sending staff to training centers.

**TRAINER ELICITS:** WHAT ARE SOME AREAS OF TRAINING THAT MIGHT ASSIST PROGRAMS TO DELIVER SERVICES MORE EFFECTIVELY? [Expected responses include:]

- Case Management
- Engagement
- Diagnostic Trainings
- Stress Reduction
- Addiction
- HIV Disease
- Cultural Competency
- Crisis and Conflict
- Communication
- Supervision

**LEARNING POINTS:** Regular and ongoing supervision assists programs in effectively providing services to tenants. Training all level of staff ensures competent services and expands the knowledge base of staff. Staff must have time in their schedules for supervision.

**IV.D: WORKING WITH BUILDING MANAGEMENT** (20–30 minutes)

**TRAINER NOTE:** See *HANDOUT #22: PROPERTY MANAGEMENT AND SUPPORTIVE SERVICES: ROLES AND RESPONSIBILITIES — AREAS OF OVERLAP*.

**TRAINER STATES:** Coordinating Property Management and Social Services in Supportive Housing is a training available through this series. We don't have the time to cover this topic in full today. It should be mentioned that there are different partnership models and pros and cons associated with each. You may choose to involve separate or single organizations in the functions of property management, building owner and service provider functions, just as you may decide to contract out for various services, such as HVAC, mechanical systems, pest control, etc.

It is important, regardless of which model you choose, to establish an effective working relationship between property management and social services staff. It is helpful to have representatives from both work together early on in the planning process as each will focus on different aspects of successful development of a project.

Areas of overlapping responsibility can become confusing. The following responsibilities are generally shared by both the social service and property management staff in supportive housing programs. It is important to keep lines of communication open when discussing these areas of overlap, and staff should be educated regarding issues of confidentiality.

**INTAKE: TENANT SELECTION AND INTERVIEWING**

- Service Interview — focus on service history and current needs
- Management Interview — focus on ability to pay rent and meet obligations of tenancy
- Tenant Interview — focus on characteristics of a good neighbor
- Common Concerns: Who makes the final decision? How much information can be shared from the service interview?

**ORIENTATION OF INCOMING TENANTS**

- Services can help tenants with concrete needs around the move, such as unpacking, getting familiar with the building routine, location of laundry, neighborhood resources, staff locations and responsibilities.
- Management orients tenants about building maintenance issues, fire drills, tenant meetings.

## RENT PAYMENT AND ARREARS

- Services can provide tenants with assistance in paying their rent (budgeting, addressing cost of substance abuse, vocational services).
- Management is usually responsible for collecting rent and addressing issues of rent arrears.
- Services and property management need to meet regularly to discuss plans for complementing each other's roles in dealing with rent arrears problems.

## DEALING WITH NUISANCE AND DISRUPTIVE BEHAVIORS

- House rules are generally developed jointly by Management and Services. Staff may develop some basic rules and tenant input can be solicited to add or revise these. All staff can help promote healthy cultural norms for the building; it is frequently service staff who help to structure these efforts.
- Property management's role is generally to issue warnings and notices of violations; services can try to help the tenant correct the problem. Other tenants are also important to involve in creating a safe and enjoyable living environment.

## PROCEDURES IN CRISES (E.G., PSYCHIATRIC, MEDICAL, PHYSICAL OR FIRE)

- Clear policies and procedures should be in place for dealing with disruptions. These should clearly spell out the chain of command in case of emergency, what information to provide to EMS, when to beep staff on call, what information to record and how.

## TENANT GRIEVANCE PROCEDURES

- Staff and tenants should be aware of systems for evaluating the program and the services given. Management and Service staff generally work on this together, with service staff informing tenants about procedures through individual case management meetings or tenant meetings.

## COMMUNITY BUILDING

- Many issues mentioned above involve aspects of community building. The tenants as well as management and service staffs are members of the building community and influence the culture of the community.
- Staff should be aware of trends in the community and plan strategies for positively influencing the culture.

## DEALING WITH HEALTH AND SAFETY ISSUES

- Management may want to conduct regular room inspections together with services.

- Services can teach ADL skills to tenants, such as practicing good hygiene habits, cooking and cleaning skills, etc.
- Services can assist with obtaining home health services, if indicated, due to inability to maintain health and safety standards.

**LEARNING POINTS:** Clarifying expectations and responsibilities for property management and social service staff can help reduce tensions that often arise, particularly around areas where responsibilities overlap, such as issues of safety, intake or dealing with emergency situations. For supportive housing programs, an effective working relationship between property management and social services staff is critical.

**V: STRUCTURES TO SUPPORT SERVICE DELIVERY****V.A: COMMUNICATION STRUCTURES** (10–20 minutes)

**TRAINER NOTE:** See *HANDOUT #23: COMMUNICATION STRUCTURES*.

**TRAINER STATES:** Many newly developed supportive housing projects invite all staff to all meetings. Time spent deciding who needs what information, and how they might best receive this information, can be time well spent. It can be helpful to draw charts illustrating which groups will convene for which purposes. Careful consideration should be given to who must attend each meeting. If someone is working on something else, is it mandatory that they be interrupted, or is it more beneficial to relay information back to them?

**TRAINER ELICITS:** WHAT ARE SOME METHODS YOU'VE TRIED FOR KEEPING MEETING GROUPS SMALL OR LIMITED TO THOSE WHO NEED TO BE THERE? [Expected responses include:]

- Solicit input from some people in writing rather than requesting attendance
- Ask people to attend only as much of the meeting as is useful for their purposes
- Establish sub-committees to work on specific projects

**TRAINER ELICITS:** WHAT ARE OTHER WAYS TO COLLECT INFORMATION ABOUT TENANTS AND OPERATIONS ISSUES? [Expected responses include:]

- Log books
- Charts
- Supervision
- E-mail
- Voicemail
- Written memos

**LEARNING POINTS:** Meetings can get bogged down with “administrivia.” Much of this type of information can be communicated by written memos or e-mails, saving time in meetings for information that requires discussion. Careful consideration should be given to which types of information should be discussed in supervision, small groups or large group settings.

**V.B: PARTNERSHIPS AND COMMUNITY RELATIONSHIPS** (10–20 minutes)

**TRAINER NOTE:** See *HANDOUT #24: MAINTAINING COMMUNICATION BETWEEN PROPERTY MANAGEMENT AND SOCIAL SERVICES.*

**TRAINER STATES:** An integral part of maintaining a healthy relationship with a partner agency is communication. To this end, programs in partnerships should:

- Orient each organization early on to each other's role
- Maintain a log/communication book between security/front desk staff and services
- Schedule regular meetings between the director of property management and the director of social services to review key issues in the relationship, address policies and procedures and resolve conflicts between staff
- Ensure a clear decision-making process (what will be decided by whom and how, e.g., consensus, democratic process) and clear lines of authority within and between property management and social services
- Schedule joint staff meetings
- Respect and value the input and feedback from one another
- Appoint an incident-review committee
- Provide team-building retreats
- Provide joint trainings on such topics as confidentiality, understanding special needs populations, and substance use

**TRAINER STATES:** Developing collaborative relationships with a tenant's community supports allows supportive housing projects to expand their resources and become involved in the wider community. This generally includes other social service and medical programs in the area, but may also involve tenant's family, friends, religious institutions and other supports. Outreach to these support systems should be done only with the tenant's consent. Programs must be mindful of confidentiality standards regarding sharing information with anyone outside of the program and secure "releases" prior to contacting anyone.

It is important to develop clear communication channels for dealing with outside agencies. Depending on the size of your program, this may mean assigning a point person to handle all calls from collaborating agencies or each case manager may handle

the calls related to his/her tenants. In order to have good working relationships with outside agencies, we must establish a trustworthy reputation.

**TRAINER ELICITS:** WHAT ARE SOME THINGS WE CAN DO TO ESTABLISH OURSELVES AS TRUSTWORTHY AND PROFESSIONAL IN THE EYES OF OTHER COMMUNITY AGENCIES? [Expected responses include:]

- Follow through with what you say you will do.
- Provide honest and complete information needed to make an appropriate referral. Consider what information the program needs in order to best serve your tenant.
- Establish a written structure, including a time frame, for dealing with referrals.
- Consider any policies, procedures or operations that obstruct communication or collaboration. Change or eliminate those that are in the way. [e.g., staff members have adequate time to work on interagency relationships? Are there overly restrictive policies regarding the sharing of information about tenants? Could this obstacle be overcome with the use of signed release/consent forms?]
- Convey an image. Using your program mission and history, decide what image you want to convey to the community and actively work to create this image and promote this message.
- Identify opportunities to bring diverse interests together. If your program has community space available, offer it to other agencies in the community. Host community barbecues or art shows. If there is a political issue affecting the community, invite people to talk about it and discuss possible strategies that will benefit the group.

**LEARNING POINTS:** Maintaining community relationships assists programs to expand their resources and integrate into the community. Mechanisms for communication between partners in supportive housing is necessary.

**V.C: RECORD KEEPING AND CHARTING** (20–30 minutes)

**TRAINER NOTE:** See *HANDOUT #25: MAINTAINING CASE RECORDS AND DOCUMENTATION*.

**TRAINER STATES:** A significant area service providers and funders must look at is how to document and maintain case records.

**TRAINER ELICITS:** WHY IS DOCUMENTATION AND RECORD KEEPING IMPORTANT?  
[Expected response includes:]

- Provides quick access to salient information relevant to tenant in case of crisis. Often, a face sheet can provide crucial information for EMS, hospital or crisis staff.
- Assists with continuity of support service between all staff. When a tenant is provided services from more than one staff member, it's vital for each to have a current record to assist with optimal interventions.
- Allows for continuity of support when a worker is not present.
- Acts as an official record of progress and accomplishments or lack thereof. Maintaining case records is an excellent barometer of movement toward accomplishing goals and objectives.
- Can be used as a tool to tailor support services to the needs of a tenant. Over a period of time, a case manager may be able to see patterns of ineffective interventions and support and better assess services needed.
- Can be used as an accurate history of crisis patterns. Often, tenants experience crisis on anniversary dates, holidays and birthdays. Patterns can be easily detected if case records are maintained effectively.
- Enhances the quality of service delivery. With heavy caseloads, referencing case records can assist case managers in the delivery of service.
- Ensures that compliance with audit standards is followed. Funding sources audit case records regularly to ensure that guidelines are being followed and that the quality of service delivery is optimal.
- Encourages follow through with goals and objectives. Well-documented case records will indicate past accomplishment that may assist the tenant with issues of self-efficacy and motivation to achieving current goals.

**TRAINER STATES:** Case records must be stored in central location, in lockable file cabinets or rooms and accessible only to designated staff. All information must be legible and clearly dated.

**TRAINER NOTE:** See *HANDOUT #26: WHAT TO INCLUDE IN A CHART*.

## WHAT TO INCLUDE IN A CHART

### TENANT IDENTIFYING INFORMATION

- Face Sheet due upon enrollment or tenant transfers (update yearly)
- Interview Face Sheet, Intake Information and Tenant Interview Status Form

### CONSENT FORMS/RELEASE OF INFORMATION

- Consent Checklist (document attempts if no consent is signed)
- Consent Forms (update every six months)

### PSYCHOSOCIAL ASSESSMENT

- Initial Psychosocial Assessment and updates

### SERVICE PLAN

- Comprehensive Service Plan (90 days from enrollment)
- Service Plan Review (1<sup>st</sup> year: every three months/thereafter, every six months)

### PROGRESS NOTES (WEEKLY)

- Notes should reflect progress to service plan goals/objectives
- Notes should ID tenant, date, purpose, signature & title of worker, setting of service and any collaterals contacted

### DOCUMENT OF PARTICIPATION

- Identifies types of activities received (monthly)
- Describes tenant's pattern of attendance or contacts (monthly)

### MEDICAL DOCUMENTATION

- Health Assessment
- Medical Exam (annually) and all other medical documents

### MEDICATION

- Medication Regimen forms: updated as medications change
- Monthly Medication Log (if medications are monitored)

### VOCATIONAL/EDUCATIONAL

- Vocational Assessment
- Career Plans
- Employment History

## ENTITLEMENTS

- Current Benefits Verification (update annually)

## MISCELLANEOUS

- Incident Reports, Discharge Summaries, Correspondence

## **BRIEF LECTURE:**

Maintaining case records with information from the tenant and on-site staff can be difficult enough. When you are also using community agencies, documentation takes on an added dimension. There are some important considerations when documenting tenant information.

- Consent Forms (a.k.a. Release of Information Forms) must be signed by the tenant authorizing contact between your program and the community agency.
- Request any important documents from the community agency for your records once the release is signed. Consent forms can be used for both verbal and written contact.
- Normalize the consent form process by introducing it during the intake and orientation process. Tenants are more willing to comply if it's perceived as a normal part of the support system in place.
- Consent forms are usually time-limited. Be aware of renewal dates in your case records and have new consents signed consistently.
- A tenant may be unwilling to sign a consent form. This is their right. Workers should document the attempts to ensure that a request was made.
- Consult an attorney to ensure that your consent and release of information processes are in compliance with all applicable federal, state and local laws and regulations.

**LEARNING POINT:** Case records are an integral component of support services and enhance the quality of service delivery. Documenting off-site service information is an important part of the case records. Consent forms are key to ensuring communication between programs.

**V.D: DEVELOPING POLICIES AND PROCEDURES** (20–30 minutes)**BRIEF LECTURE:**

Every supportive housing program should have well-documented policies and procedures which are clearly written and understandable to all levels of staff. While policies are reviewed and revised throughout the course of operating supportive housing, it is essential that critical policies and procedures such as on-call systems, fire safety procedures and incident documentation be in place from the start. Policies and Procedures should describe the following: who does what, when or how often is it done, how it is done (in writing, in a meeting, etc.) and what resources are available (staff on call, logbooks). Forms should also be constantly updated and included in any program manuals.

Most programs collect these policies and procedures in a manual form, which, ideally should be accessible to staff. Generally, supportive services programs develop two manuals:

- A SUPPORTIVE SERVICE PROGRAM POLICY AND PROCEDURES MANUAL, which describes in detail the operations of the supportive housing program. Property management's policies and procedures may be included or may be separate.
- A RESIDENT/TENANT HANDBOOK/ORIENTATION GUIDE, which explains the program and its operations to tenants and can be included in an orientation packet

While each program will organize their manuals in their own way, the following categories are commonly included.

**TRAINER NOTE:** See *HANDOUT #27: DEVELOPING POLICIES AND PROCEDURES: A GUIDELINE FOR SUPPORTIVE HOUSING PROVIDERS.*

**WHAT TO INCLUDE IN A PROGRAM POLICIES AND PROCEDURES MANUAL****INTRODUCTION**

- Introduction; Agency Overview and Mission; Program Description and Goals

**ORGANIZATIONAL CHART**

- Organizational Chart; Job Descriptions

**ADMISSION AND DISCHARGE POLICIES**

- Tenant Selection Processes; Eviction Processes

## SOCIAL SERVICE POLICIES

- Program policies (i.e., medication management, budgeting assistance, representative payee, referrals, etc.); Service Documentation Policy; Confidentiality Policy; Fraternalization Policy; Miscellaneous operations: Car Policy, Petty Cash, etc.

## BUILDING MANAGEMENT POLICIES

- Rent Collection; Room Inspections; Repairs and Maintenance; Lease Violations; Health and Safety Violations; Front Desk Responsibilities; Building Security and Visitor Policies

## EMERGENCY POLICIES AND PROCEDURES

- Psychiatric/Medical; Accidents and Death; On-Call Phone Numbers, Emergency Contacts and Resources

## FIRE SAFETY POLICY

- Fire Prevention and Inspection Policy

## CHILD ABUSE AND NEGLECT REPORTING

- Criteria for Identifying Incident of Abuse or Neglect; Child Abuse and Neglect Reporting

## GRIEVANCE POLICIES

- Formal Tenant Grievance Policy

## INCIDENT REVIEW

- Investigating an Incident; Writing and Filing Incident Reports

## MEDICAL POLICIES

- Medication Storage; Monitoring Medications

## WHAT TO INCLUDE IN A TENANT HANDBOOK/ORIENTATION GUIDE

### INTRODUCTION

- Agency Overview; Program Description and Goals; Organizational Chart and Job Descriptions; Hours of Program Operations

### BUILDING PROCEDURES

- Repairs; Mail/Phone messages; Garbage Disposal; Apartment Care; Lost Keys; Move-in; Security Deposit; Furniture and Liability for Damage; Apartment Inspection

#### HOUSE RULES AND CONSEQUENCES

- Noise; Illegal Activities; Health and Safety Violations; Smoking; Evictions and Holdovers

#### RENT COLLECTION

- Notices and procedures for collection; Rent arrears and payment plans

#### FACILITIES

- Laundry Room, Dining Room, Activity Rooms, Garden/Outdoor Space; Computers; Phones (using public phones, installing room phones, taking messages); Mail Room; Storage; Garbage Pick-up

#### GRIEVANCE PROCEDURES

- Formal Grievances; Dispute-Resolution Services

#### SECURITY

- Visitor/guest Policies; Security Rounds

#### SOCIAL SERVICES

- Description of Services Available; Hours of Program; How to Access Services

#### TENANT COUNCIL

- Purpose and Goals; How to Become Involved

**LEARNING POINTS:** Having clear policies and procedures in place helps supportive housing projects run smoothly. A policy manual provides support and guidance for staff so they know what to do as well as where and when to call for support.

**V.E: ONGOING PROGRAM DEVELOPMENT** (10–20 minutes)

**TRAINER ELICITS:** WHAT ARE SOME OF THE PURPOSES OF EVALUATING A PROGRAM? [Expected responses include:]

- Reveals whether the program is effective in meeting its goals
- Allows for creative sharing of ideas about ways to get things done and improvements to the program
- Identifies other ways (than the stated goals) that the program impacts tenants or the community-at-large
- Promotes communication about the program and expectations of community members
- Measures consumer satisfaction
- Reflects the value of the services to the funders and the community by documenting outcomes
- Improves delivery of service mechanisms
- Improves cost-effectiveness

**TRAINER STATES:** Ideally, programs should evaluate their services on a regular basis and incorporate changes based on the information gathered. Realistically, however, it is not always possible to devote the time and energy to program evaluation. The following three circumstances, however, indicate that evaluation may be indicated:

- Changes in tenants' needs
- Changes in tenant's use of services
- Changes in funding and regulations
- Frequent crisis
- High staff turnover

**STEPS TO EVALUATE THE PROGRAM**

**STEP #1: DETERMINE WHAT YOU WANT TO EVALUATE:** The first step in the process of evaluation is deciding what you want to measure and/or evaluate and what type of resources you have to dedicate to the process. Most housing providers do not have a great deal of resources to devote to program evaluations, but program development need not be complicated or expensive. Time frame and cost should be considered when looking at your method and process of evaluation.

**STEP #2: CHOOSE AND IMPLEMENT METHODS TO GATHER INFORMATION:** There are a variety of ways to gather information and each of them have pros and cons in terms of depth of information obtained and ease of implementation. All of the methods

mentioned below are simple ways to obtain and document information. Sources can include staff, tenants and/or community members.

- Individual interviews
- Periodic questionnaires and surveys
- Focus groups
- Regular tenant input meetings
- Documentation review
- Observation (may be conducted by a third party)
- Goals and indicators that are measurable

**STEP #3: ANALYZE INFORMATION GATHERED:** When analyzing data, always start from review of your organization's goals, that is the reason you undertook the evaluation in the first place. For example, if you wanted to improve your program's strengths and minimize weak areas, you could organize data by those categories and then make suggestions about how to improve the program. If you wanted to fully understand how your program works, you could organize data in the chronological order in which tenants go through your program. If you are conducting an outcome evaluation, you could categorize data according to the indicators for each outcome.

**STEP #4: DEVELOP A PLAN TO MAKE MODIFICATIONS:** Be sure program staff have a chance to carefully review and discuss the information gathered. Decide what will be changed as a result of the information gathered and develop action plans, including who is going to do what and by when.

**TRAINER NOTE:** SMALL GROUP EXERCISE ON CONDUCTING A TENANT SATISFACTION SURVEY. See **HANDOUT #28: SAMPLE TENANT SATISFACTION SURVEY**. Break the trainees into small groups and ask them to review the tenant satisfaction survey and then process the following questions

- Do you think that this survey or a similar one would be a valuable tool in your organization?
- What information would you be most interested in obtaining in your program?
- How would you implement such a survey?
- If this was your program how would you use the information gathered?

**LEARNING POINTS:** Program evaluation is a necessary way to obtain information about how the program is doing and where changes need to be made. Often, providers are reluctant to take on program evaluation, fearing that it is too scientific and that they lack expertise. The point of this section is to illustrate that program evaluation need not be overly complicated or onerous and can actually be extremely simple.

**VI: CONCLUSION** (10–20 minutes)

**TRAINER NOTE:** Bring closure to the training by reviewing the highlights of the day. Ask for questions and comments about the content.

**TRAINER ELICITS:** WHAT ARE SOME OF THE PRINCIPLES OF SUPPORTIVE HOUSING WE DISCUSSED TODAY? [Expected responses include:]

- Affordability
- Safety and Comfort
- Desired and Flexible Services
- Promoting Independence

**TRAINER ELICITS:** WHAT ARE SOME OF THE AREAS PROGRAMS MUST CONSIDER IN THE DEVELOPMENT OF A SERVICE PROGRAM? [Expected responses include:]

- Be able to identify a philosophical approach to services
- Understand the importance of clarifying program goals and be able to translate these goals into services
- Understand the impact of service design choices, including population served, whether services are offered on- or off-site and the effects of physical design
- Be able to develop a service menu appropriate to their tenant's needs and choices
- Understand how to involve tenants in the design and operation of the service program
- Be able to develop effective program policies and procedures
- Understand staffing considerations in designing a services program
- Be able to implement effective structures to support the delivery of services, such as communication and reporting structures and a system for maintaining collateral relationships
- Understand the importance of evaluating the service program and learn evaluation methods

**LEARNING POINT:** Trainer will review significant points of the training and clarify any remaining questions.